

TRACKING LANDOWNERS

From Hello to Last Goodbye

Troy Kuphal, Manager
Scott SWCD

INTRO

- ▶ We all have tracking systems
- ▶ Needs change, so must systems
 - ▶ 200 – 250 requests for assistance
 - ▶ 50 – 60 projects
 - ▶ Dozens of funding sources
 - ▶ 100's forms (often repeat information)
 - ▶ 170+ status reviews
 - ▶ Growing volume and complexity of reporting
- ▶ Data rich but information poor
- ▶ Reached critical mass
 - ▶ Adding more columns, rows and tabs to a spreadsheet no longer practical



OVERVIEW

SWIMS

Soil & Water Information Management System



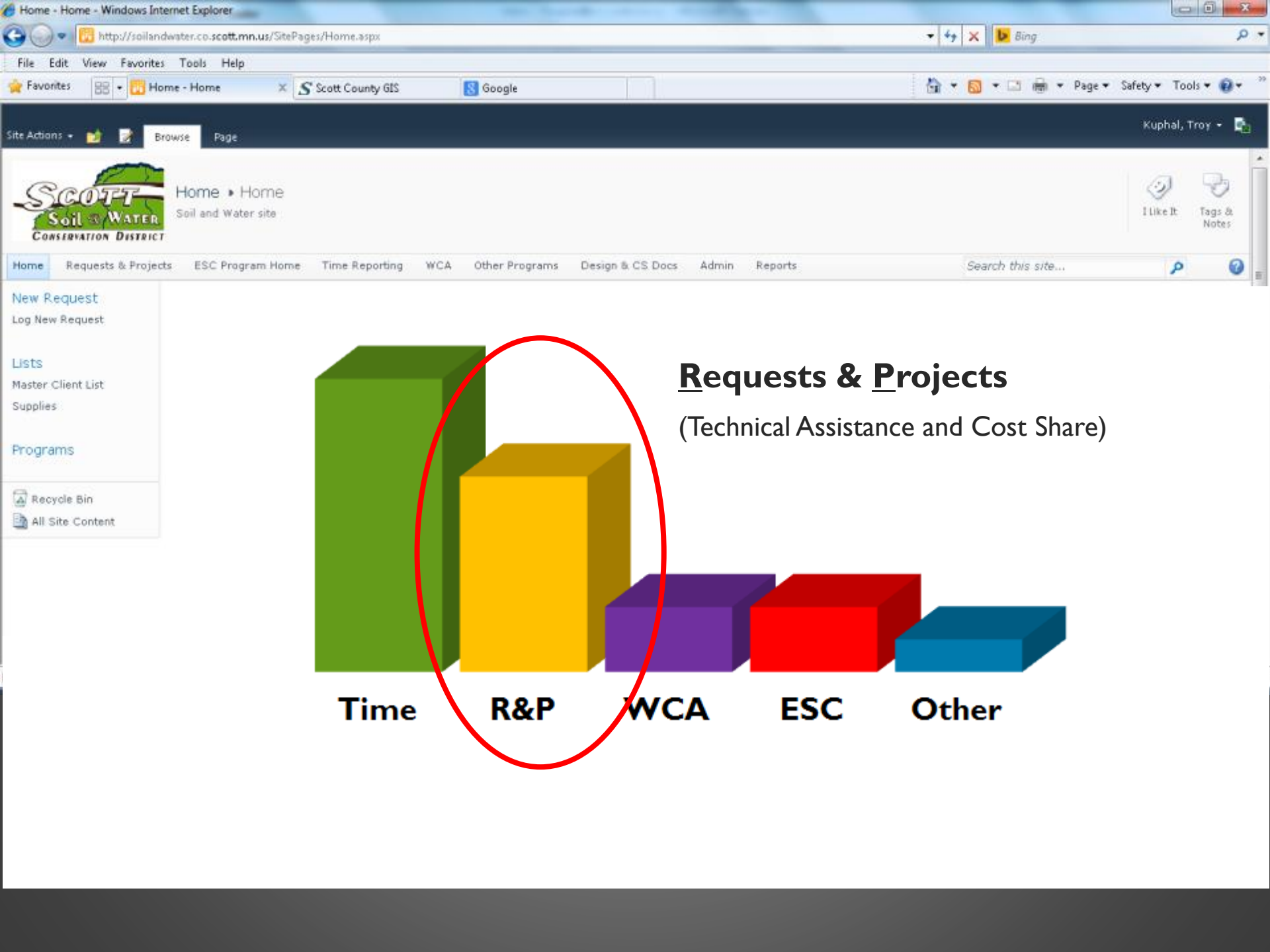
- ▶ Microsoft SharePoint
 - ▶ Browser-based (intranet) application
 - ▶ Sits on county server (regular backup)
- ▶ Utilizes county user network
 - ▶ Logging in tells it who you are
 - ▶ Viewing, editing, deleting controlled by permissions
- ▶ Unlimited customization
 - ▶ No programming language
 - ▶ Adaptable to changing data needs
- ▶ Multiple modules (“Lists”)

GOALS

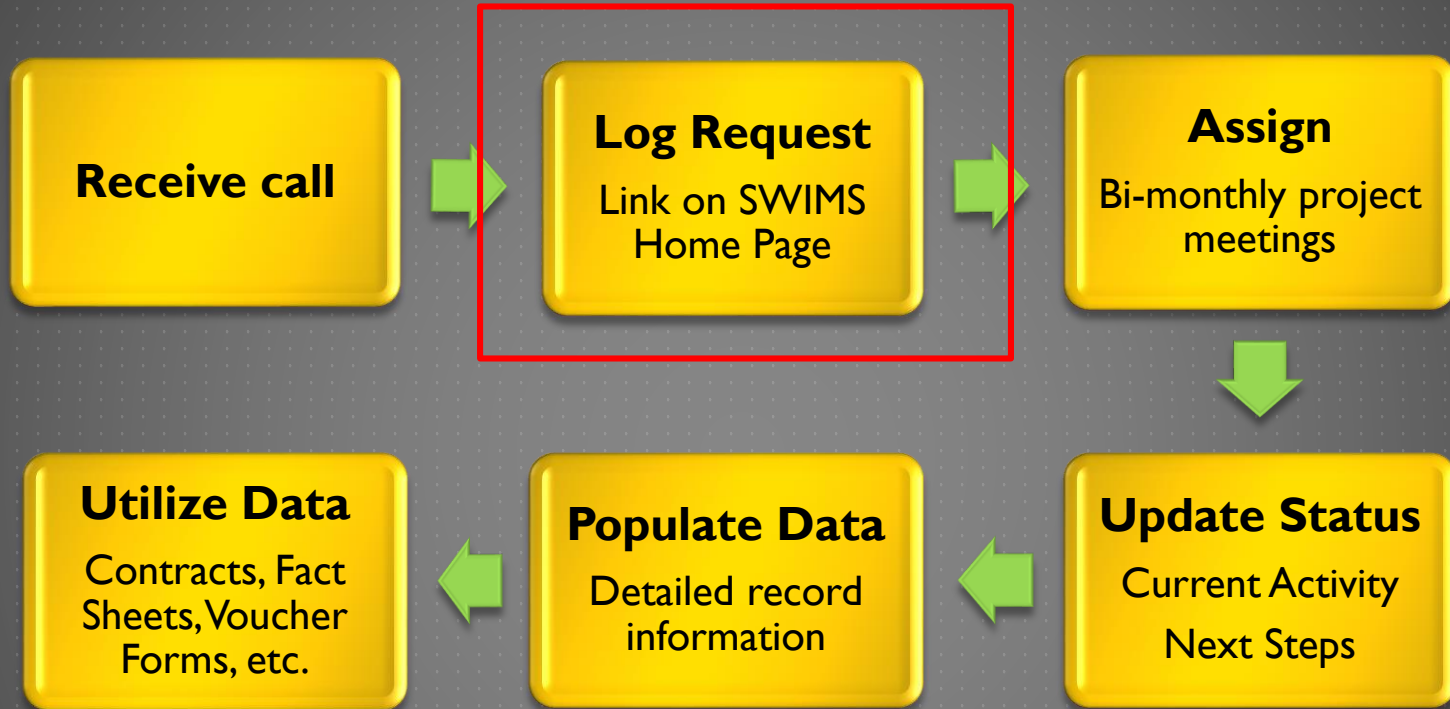
More than tracking
landowners



- ▶ Reduce paperwork burden
 - ▶ More conservation on the ground
- ▶ Make time reporting less hated
 - ▶ Faster and easier
 - ▶ Minimize repetitive entry
- ▶ Increase accountability
 - ▶ Ensure data accuracy
 - ▶ Improve ability to glean, analyze, report
- ▶ Improve overall management
 - ▶ Workload distribution
 - ▶ Monitor progress



OVERVIEW – TRACKING PROCESS




LOGGING SERVICE REQUEST
















- ▶ InfoPath data entry form
 - ▶ Accessed from SWIMS Home Page
- ▶ Client Name
 - ▶ Master Client lookup list
 - ▶ Eliminates repeat data entry
- ▶ Reason for calling
 - ▶ Interest/Concern lookup list
 - ▶ Narrative
- ▶ City/Township
 - ▶ General location
- ▶ Parcel ID
 - ▶ GIS lookup/locating
- ▶ Watershed
 - ▶ Billing

Log New Request

Received Date:	10/25/2014
Client:	Ackerman, Julie Aced, David
Interest/Concern:	
Request Description:	Bluff Erosion Conservation Drainage Cropland Ephem Erosion Feedlot Filters/Riparian Buffers Flooding Groundwater Protection Invasive Species Lakeshore Restoration Living Windbreak/Barriers Manure Management Multiple Interests/Concerns Native Grasses/Prairie Non-cropland Erosion Nutrient Management Other/Unsure Pasture Management Raingarden Ravine Erosion Sedimentation Sheet/Rill Erosion Shoreline Erosion Streambank Erosion Trees/Forestry Waste Management Wetland Restoration Wildlife/Habitat Improv Zoning Compliance
City/Township::	
Parcel ID:	
Watershed	



R & P LIST ATTRIBUTES

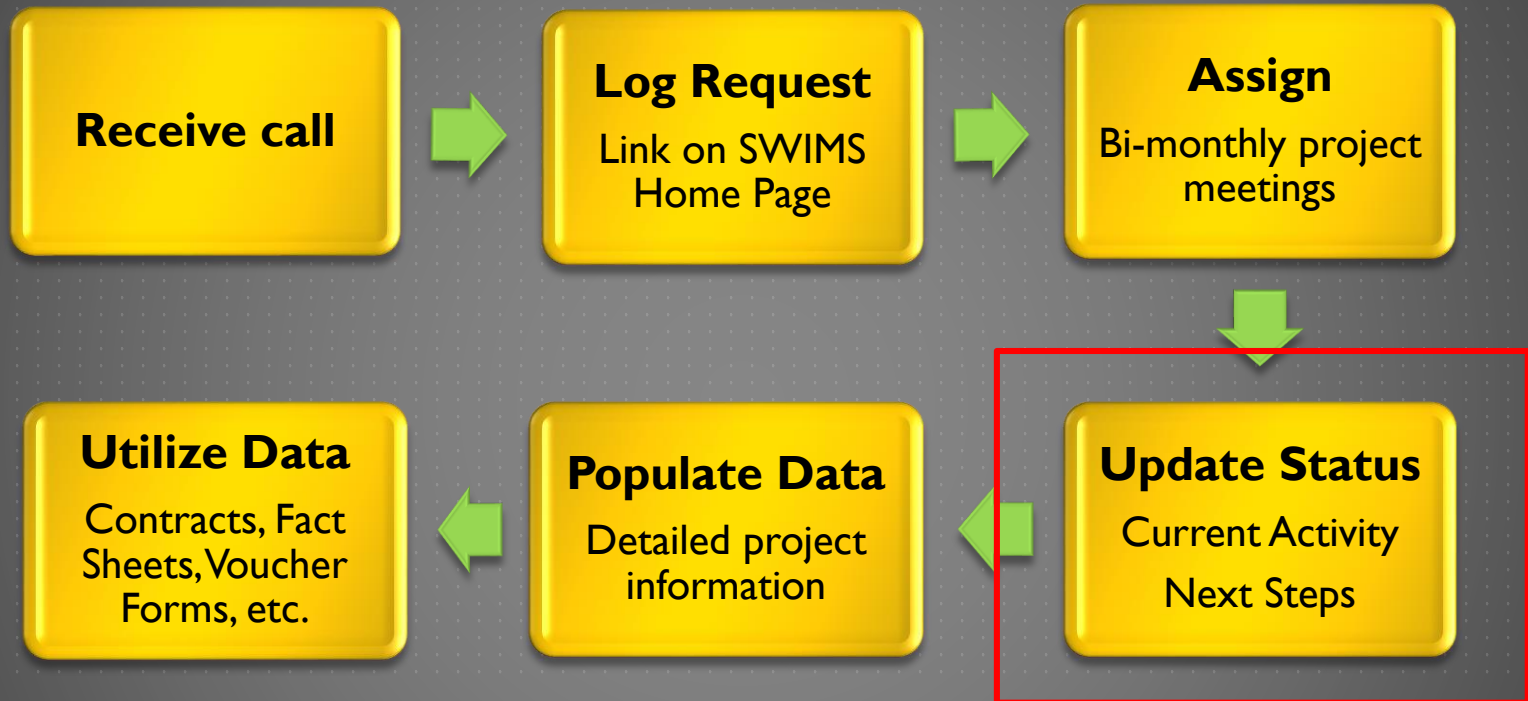
 Activity Status	 Interest or Concern	Practice Qty	Section
 Address	Landowner Share	Practice Units	Sed After
Approval Date	 LGU	Project Description	Sed Before
Assigned To	Local CS	Project Display Name	Sed Unit Cost
Certification Date	Log Date	Project ID	Soil Loss After
 City	Minor Watershed	Project Total CS	Soil Loss Before
 Client Name	 Mobile Phone	Project Overall Cost	 State
Closed Reason	Next Step	Qtr Qtr Sect	State CS
Contract End Date	Next Step Date	Qtr Sect	Status Review Years
Contract No	NPEAP Role	Range	SWCD CS
Contract Start Date	Operator Name	 Record ID	TA Funding Eligibility
Contract Term	P After	 Record Notes	Tecnical Rep
CS Source Grants	P Before	 Request Display Name	Township
Federal CS	P Unit Cost	Resource Protected	Tract #
General Status	 Parcel ID	Runoff After	 Watershed
 Home Phone	Practice	Runoff Before	 Zip

 Manual (6)  Auto-pop (8)

R & P LIST ATTRIBUTES (All)

Activity Status	Fed Incentives	P Unit Cost Total	Range	State Total
Address	Federal CS	Parcel ID	Record ID	Status Changes
Approval Date	Federal Total	PerpetualEasement	Record Notes	Status Review Years
Archive & Delete	General Status	Practice	Re-enrolled	SWCD Contract No
Assigned To	Harvestable	Practice Code	Repair	SWCD CS
Assigned To Name	Home Phone	Practice Name	Request Display Name	SWCD CS Perc Actual
Billing Entity Text	Hours	Practice Qty	Resource Protected	SWCD CS Percent Max
BrdCommDateText	Interest or Concern	Practice Units	Runoff After	SWCD Incentives
Certification Date	Interest or Concern Name	PracticeUnits	Runoff Before	SWCD Total
Certification Date Text	Landowner CS Perc Actual	Program Year	Runoff Vol Reduced	TA Funding Comma Delim
City	Landowner Share	Program Years Delim	Section	TA Funding Eligibility
Client	LGU	Programs	Sed After	Tecnical Rep
Client Address 2	Local CS	Programs Comma Delim	Sed Before	Township
Client Name	Log Date	Project Description	Sed Reduced	Tract #
ClientCSZ	Minor Watershed	Project Display Name	Sed Unit Cost	Tract Current
Closed Reason	Mobile	Project ID	Sed Unit Cost SWCD	Watershed
ClosedByDate	Modified By	Project Total Construction	Sed Unit Cost Total	WMO/WD Contract No
Contract End Date	Next Step	Project Total CS	Soil Loss After	WMO/WD CS Perc Actual
Contract No	Next Step Date	Project Total CS and Incents	Soil Loss Before	WMO/WD CS Percent Max
Contract Start Date	NPEAP Role	Project Total Incentives	Soil Loss Reduced	WMO/WD Incentives
Contract Term	Operator Name	Project Total Overall Cost	SplitIncentivePmnt	WMO/WD Total
Created By	P After	ProjectStartRealText	State	Zip
CS Source Parent Grant	P Before	ProjectStatus	State CS	
CS Source Grants	P Reduced	Promote to Project	State CS Perc Actual	
Current Landowner	P Unit Cost	Qtr Qtr Sect	State CS Percent Max	
Fed CS Perc Actual	P Unit Cost SWCD	Qtr Sect	State Incentives	

OVERVIEW – TRACKING PROCESS



VIEWING & EDITING STATUS

The screenshot shows a web application interface for viewing and editing project status. The left sidebar contains a menu with 'My Assigned' highlighted. A red arrow points from this menu item to a table of project requests. The table has four columns: 'General Status', 'Activity Status', 'Next Step', and 'Next Step Date'. The table lists 12 records, all with 'Active' status.

General Status	Activity Status	Next Step	Next Step Date
Active	Initial contact made	Provide information	11/20/2014
Active	Request logged	Make intital contact	11/15/2014
On Hold	Site invest completed	None	
Active	Initial contact made	Conduct site invest	11/15/2014
Active	Research completed	Provide information	12/1/2014
Active	Site invest completed	Landowner reply	11/15/2014
Active	Request logged	Make intital contact	11/15/2014
Active	Request logged	Make intital contact	11/15/2014
Active	Request logged	Make intital contact	11/15/2014
Active	Request logged	Make intital contact	11/15/2014
Active	Request logged	Make intital contact	11/15/2014
Active	Design finished	Construct/install	8/15/2015
Active	Voucher processed	None	

Active records assigned to “me”

TRACKING STATUS – User Interface

Projects Master List - SR-14-309

Testguy, Joe Bluff Erosion (SR-14-309)

Identification

Record ID: SR-14-309
Received Date: 10/26/2014

Interest/Concern: Bluff Erosion

Assigned To: Not Assigned

Promote to Project

☐

People

Cooperator: Testguy

Home: 952-1

Address: 123 F

Operator:

[Add New](#)

Next Step:

- Make intital contact
- Make intital contact**
- Conduct research
- Conduct site invest
- Provide information
- Provide tech assist
- Conduct tech assess
- Survey
- Prepare prelim design
- Landowner reply
- Design
- Construct/install
- Certify installation
- Process voucher
- Recontact landowner
- None




















Parcel ID: 9800100345

ip: Twp

Conservation Notes

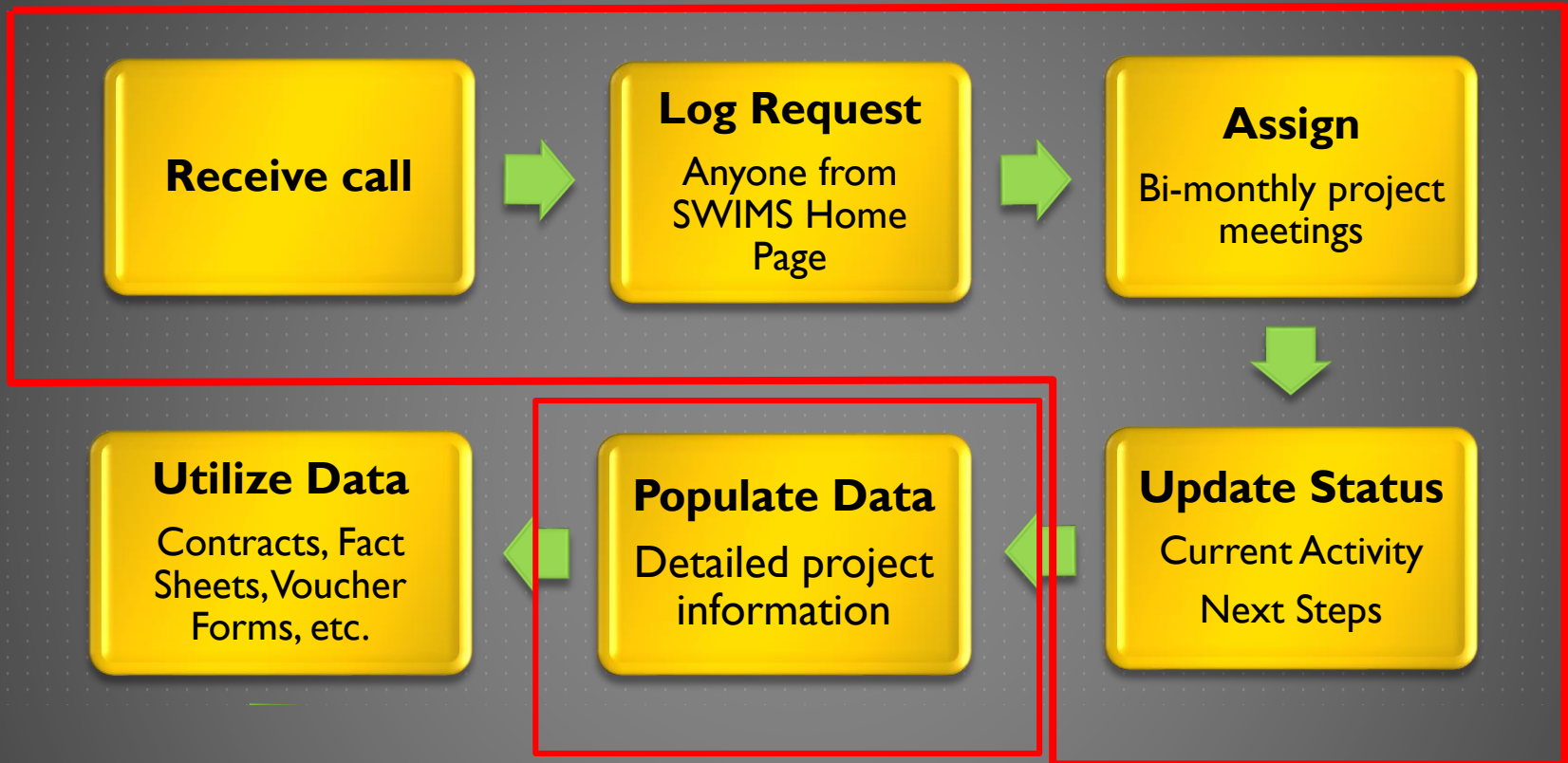
10/28/2014 TPK: Joe called to to request a site visit. The bluff near his home is unraveling and is threatening his garage and driveway.

R & P LIST ATTRIBUTES

 Activity Status	 Interest or Concern	Practice Qty	Section
 Address	Landowner Share	Practice Units	Sed After
Approval Date	 LGU	Project Description	Sed Before
 Assigned To	Local CS	Project Display Name	Sed Unit Cost
Certification Date	Log Date	Project ID	Soil Loss After
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 Client Name	 Mobile Phone	Project Overall Cost	 State
Closed Reason	 Next Step	Qtr Qtr Sect	State CS
Contract End Date	 Next Step Date	Qtr Sect	Status Review Years
Contract No	NPEAP Role	Range	SWCD CS
Contract Start Date	Operator Name	 Record ID	TA Funding Eligibility
Contract Term	P After	 Record Notes	Tecnical Rep
CS Source Grants	P Before	 Request Display Name	Township
Federal CS	P Unit Cost	Resource Protected	Tract #
 General Status	 Parcel ID	Runoff After	 Watershed
 Home Phone	Practice	Runoff Before	 Zip

 Manual (6)  Auto-pop (8)  Status (5)

OVERVIEW - TRACKING PROCESS



TRACKING PROJECTS

Projects Master List - SR-14-309

Project/Practice Info

Project ID: **CP-14-309** Status Rev: **Certifica**

Project Name: **Testguy, Joe Grade Stabiliza**

Practice: **Grade Stabilization Structu**

Practice Quantity: **1**

Term/Important Dates

Contract Term: **10**

Contract Start Date: **05/15/2015** Cor: **10**

WPC/SWCD Approval: **11/18/2014** Cer:

Money

AGENCY	INCENTIVES	COST SHAR
		Amount
Federal	\$0	\$0.00
State	\$0	\$4,000.00
WMO/WD	\$0	\$4,000.00

Cost Share Sources/Grants (Choose)

- ☒ BWSR SCS Base CY14
- ☐ SWMO 2013 EPA (NEW) CY14
- ☐ SWMO 2013 CWP Credit River Specific
- ☐ SWMO LGF Nutrient Mgmt CY14
- ☒ SWMO LGF General Practices CY14
- ☐ SWMO 2012 CWF Runoff Reduct Nativ
- ☒ SWCD 2014 CWF Lower MN Rural BMP
- ☐ SWCD 2014 CWF Lower MN Streambar
- ☐ FEDERAL EQUIP CYXX
- ☐ PLSLWS LGF General Practices CY14
- ☐ SWMO 2013 EPA (NEW) CY15
- ☐ BWSR SCS Base CY15

Resource Protected

Minnesota River

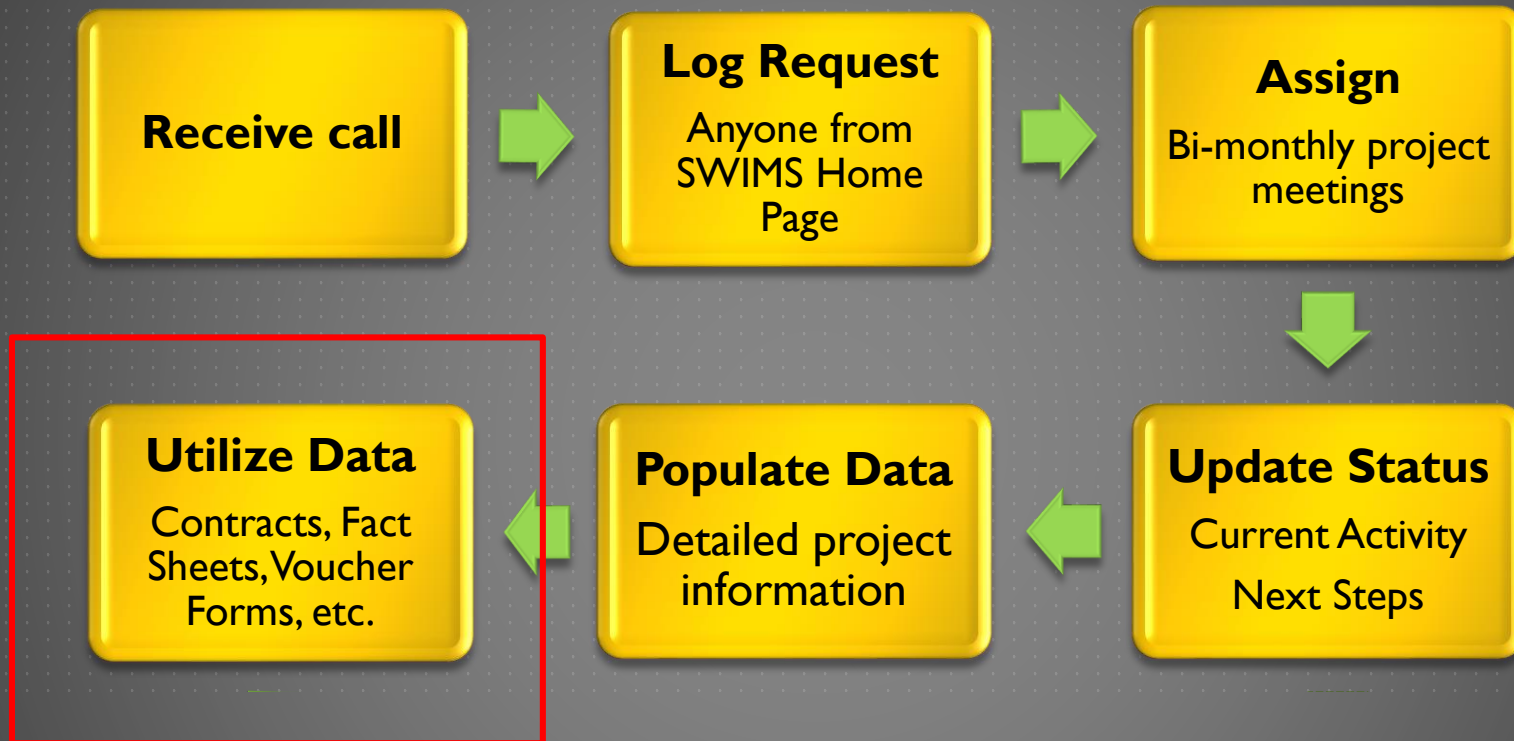
Project Description

A grade stabilization (or control) structure is a practice used to prevent formation or advancement of gullies or head cuts where the elevation difference between two points in a natural or artificial channel is severe within a relatively short distance. In addition to protecting water quality by eliminating a significant source of sediment, grade control structures may also help reduce public safety and infrastructure hazards resulting from severe washouts.

Environmental Benefits

					Unit Costs		
Parameter	Units	Before	After	Saved	SWCD	WMO	Overall
Soil Loss	Tons/Yr	55.0	1.0	54.0			
Sediment	Tons/Yr	10.0	1.0	9.0	\$11	\$44	\$111
Phosphorus	Lbs/Yr	6.0	0.5	5.5	\$18	\$73	\$182
Runoff	Ac Ft/Yr	0.0	0.0	0.0			

OVERVIEW - PROCESS



UTILIZING DATA

Goal of a well-designed database: enter data once...use again and again

- ▶ Auto-populated forms
 - ▶ Cost share contracts, Fact Sheets, Vouchers, other
- ▶ Time reporting
 - ▶ Grant name and billing information



CONSERVATION PROJECT FINANCIAL ASSISTANCE CONTRACT

GENERAL INFORMATION

Project ID: CP-14-309

Financial Assistance Provider: Scott SWCD	Contract No.	Contract Type: Individual <input checked="" type="checkbox"/> Group <input type="checkbox"/>	Other Cost Share Sources: Fed <input type="checkbox"/> State <input checked="" type="checkbox"/> Local <input checked="" type="checkbox"/>	Amendments (if any)	Canceled (if applicable):
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APPLICANT

Name: Joe Testguy	Address: 123 First Avenue NW	City/State: New Prague, MN	Zip: 56071
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PROJECT LOCATION

City/Township Name: Blakeley Twp	Township: 113N	Range: 26W	Section: 18	1/4 1/4: NE1/4 ; NE1/4	Minor Watershed #:
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PROJECT TYPE & COST ESTIMATE

Conservation Practice Name: Grade Stabilization Structure	Quantity: 1.0	Units: Each
Eligible components (list NRCS Practice Codes):	Other recognized technical practice(s):	Check whichever applies: Engineered Practice: <input checked="" type="checkbox"/> Ecological Practice: <input type="checkbox"/>
		Total Cost Estimate: \$10,000.00

INSTALLATION COST SHARE AMOUNTS BY SOURCE

Scott SWCD: \$0.00	Federal: \$0.00	Landowner: \$1,000.00
Watershed: \$4,000.00	State: \$4,000.00	Other:

AMOUNTS AUTHORIZED UNDER THIS CONTRACT

Project incentives shall not exceed \$1,000.00

Project installation cost-share shall not exceed \$0.00 or 0.0 percent of total eligible costs, whichever is less.

TERMS AND CONDITIONS

I (we), the undersigned, hereby request financial assistance to help defray the cost of installing the conservation project listed above. It is understood that:

- The Applicant and, if different, landowner are responsible for proper operation and maintenance of the practice and any related components applied under this contract, and to ensure the conservation purpose and objectives are met for the

Conservation Cooperator Proposed Project Fact Sheet



Joe Testguy Grade Stabilization Structure

Cooperator & Location

Applicant(s): Joe Testguy
Address: 123 First Avenue NW, New Prague
Location: Township: 113N Range: 26W Sect: 18
City/Town: Blakeley Twp
Watershed:

Project Details

Practice

Grade Stabilization Structure

Quantity/Units: 1.0 Each

Projected Installation: Spring 2015

Resource Protected

Minnesota River

Project Description

A grade stabilization (or control) structure is a practice used to prevent formation or advancement of gullies or head cuts where the elevation difference between two points in a natural or artificial channel is severe within a relatively short distance. In addition to protecting water quality by eliminating a significant source of sediment, grade control structures may also help reduce public safety and infrastructure hazards resulting from severe washouts.

Aerial View of Project Site



Photo of Current Project Site



Environmental Benefits

Parameter	Before	After	Saved
Soil Erosion (tons/yr)	55.0	1.0	54.0
Sediment Load (tons/yr)	10.0	1.0	9.0
Phosphorus Load (lbs/yr)	6.0	0.5	5.5
Runoff Reduction (acre ft)	0.0	0.0	0.0

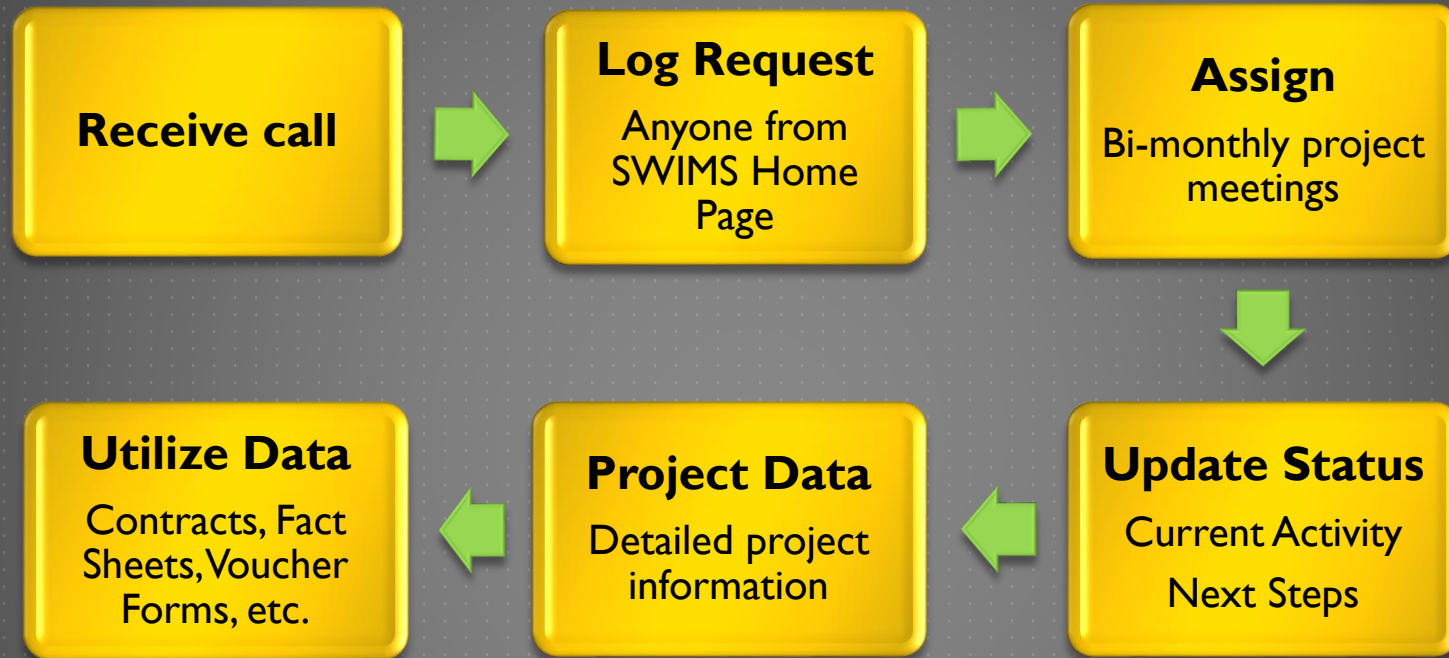
Cost Analysis

Project Costs		Funding by Source		Approvals/Type		Unit Costs*		
Construction	\$9,000.00	Federal	\$0.00	Approval Date	11/18/2014		Sediment (\$/ton)	Phos (\$/pound)
Materials	\$1,000.00	State	\$4,000.00	Target Project	<input type="checkbox"/>	SWCD	\$11	\$18
		SWCD	\$1,000.00	EPA-319 Funds	<input checked="" type="checkbox"/>	SWMO	\$44	\$73
		SWMO	\$4,000.00	Credit River Grant	<input type="checkbox"/>	All Sources	\$111	\$182
Total:	\$10,000.00	Cooperator	\$1,000.00	Clean Water Fund	<input checked="" type="checkbox"/>	*Over term of cost share contract		

SCS VOUCHER AND PRACTICE CERTIFICATION SUMMARY FORM

A	PAYEE INFORMATION	<input type="checkbox"/>	Check if name or address change	B	PRACTICE INFORMATION				
Name Joe Testguy				ID Number					
Address 123 First Avenue NW				BWSR Program		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						Base Grant	Comp Grant	FWQMG	Other
City, State, Zip New Prague, MN 56071				Tons Soil Saved 54.0		Tons Sediment Reduced 9.0		Lbs. Phosphorus Reduced 5.5	
C	COST INFORMATION	Basis of Request		Type of Request		Total Construction Cost			
		<input checked="" type="checkbox"/> Installation	<input type="checkbox"/> Reinstallation	<input type="checkbox"/> Partial <input checked="" type="checkbox"/> Final		\$9,000.00			
R/I	ITEM	QUANTITY	UNITS	UNIT PRICE	COST				
R	Common excavation	1,000.0	Cu Yds	\$6.00	\$6,000.00				
R	Outlet structure	1.0	Each	\$1,000.00	\$1,000.00				
R	Seeding and mulch	1.0	Job	\$1,000.00	\$1,000.00				
R: Receipt/Invoiced Item I: In-kind Contribution					Total:	\$8,000.00			
<input checked="" type="checkbox"/> Insert cost item									
<p>I certify that this is an accurate and true summation of the actual costs and quantities of material, labor, and equipment used on the above project. In cases where the receipts included items not used on the project, I have corrected them accordingly.</p> <div style="display: flex; justify-content: space-between; margin-top: 20px;"> <div style="width: 45%; text-align: center;"> _____ (Payee Signature) </div> <div style="width: 45%; text-align: center;"> _____ (Date) </div> </div>									
D	PAYMENT INFORMATION								
TOTAL COST OF PRACTICE:		\$8,000.00	[c above]		(a) Total of Previous Payments:		\$0.00		
BWSR BASE GRANT COST		\$4,000.00	[from box e]		(b) Current Cost-Share Request:				
SHARE PAYMENT:									
Other Funding Sources (Please identify source)					COST-SHARE PROGRAM				
Federal:		\$0.00			(c) Total Cost Approved:		\$8,000.00		

OVERVIEW - PROCESS



Edit



Save



Close



Paste



Copy



Cut

Delete
Item

Current View:

Edit

Commit

Clipboard

Actions

Views

Testguy, Joe Bluff Erosion (SR-14-309)**Identification**

Record ID: **SR-14-309**
Received Date: **10/26/2014**

Interest/Concern:
Bluff Erosion

Assigned To:
Kuphal, Troy

Promote to Project**People**

Cooperator:
Testguy, Joe

Home: **952-123-HOMI** Mobile: **952-123-CEI**

Address:
123 First Avenue NW

Operator (if applicable):

[Add New Person](#)

Refresh

Project complete

TA provided
Rejected alternatives
Lost interest
Neighbor not interested
No cost share
No feasible solution
No resource concern
Not eligible
Project complete
Too costly
Fixed on own
Other

Conservation Notes

10/28/2014 TPK: Joe called to to request a site visit. The bluff near his home is

TA Eligibility

Select all that apply:

- ☒ EPA-319
☐ Farm Bill Assist
☐ Credit River Grant
☒ CWF Grant
☐ None
☐ Not sure yet

Tract Info

Original: **N/A**
Current: **N/A**

Parcel ID:

9800100345

PARTING THOUGHTS

- ▶ Solutions range from simple to complex
- ▶ Depends on needs and desired outputs
- ▶ The only wrong solution is one that doesn't do what you need

“If you put in little effort and expect big returns, you will be deeply disappointed. You don't get apples by planting lemon seeds.”

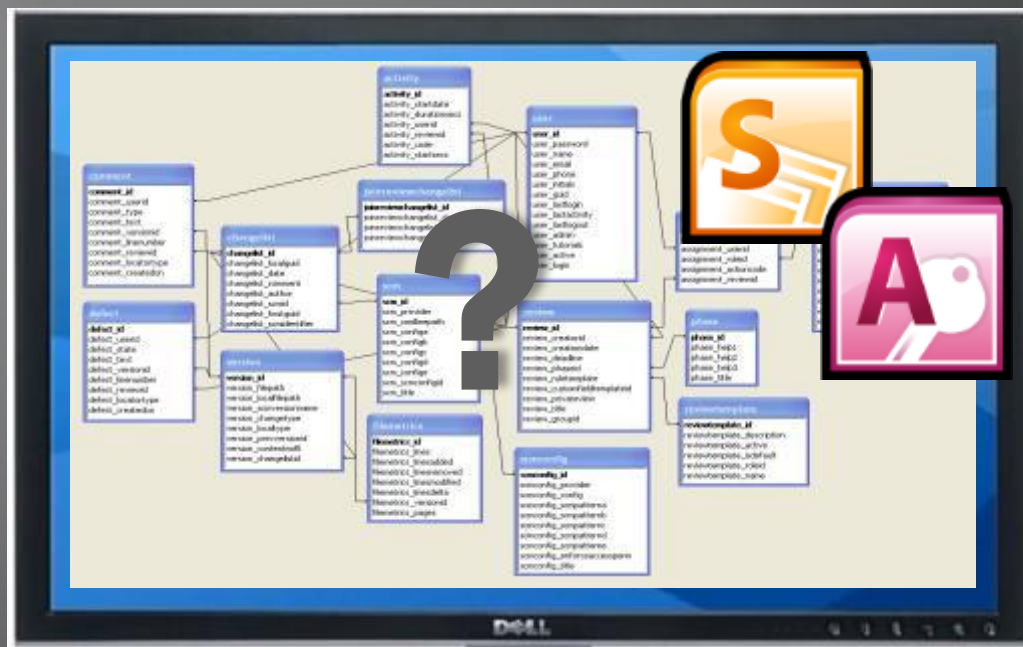
Catherine Pulsifer



PARTING THOUGHTS



Book4 - Microsoft Excel										
File Home Insert Page Layout Formulas Data Review View Design Layout References										
Clipboard Font Paragraph Styles Cells										
Conditional Formatting Tables Cell Insert Data Tables Sort & Filter										
D6K Well Decons is oning										
A	B	C	D	E	F	G	H	I	J	K
1	Account ID	Client	Interest as Cause	Position	Qty	Units	Activity Status	Cons Status	Next Step	Next Step Date
2	98-18-004	Adams, Robert	Streambank Erosion	Streambank Protection	50	Ln Ft	Constructed/installed	Closed	None	
3	98-13-299	Adams, Robert	Streambank Erosion	Streambank Protection	50	Ln Ft	Design finished	Active	Construct/install	10/6/2014
4	98-09-1090	Adams, Joe & Terrie	Living Windbreak/Bambers	Hardscape Wind Barriers	3	Acres	Constructed/installed	Closed	Make initial contact	
5	98-09-018	Adams, Joe & Terrie	Conservat on Drainage	Fiter Strip	3.3	Acres	Constructed/installed	Closed	None	
6	98-14-106	Ahlbrecht, Chris	Groundwater Protection	Well Decons is oning	1	Each	Voucher processed	Closed	None	9/16/2014
7	98-13-017	Ahlbrecht Bros LLC	Cropland Ephem Erosion	Grassed Waterway	10889	Ln Ft	Certification complete	Closed	Process voucher	12/17/2013
8	98-06-018	Ahlbrecht, Lynn	Ravine Erosion	Grade Stabilization	3	Each	Constructed/installed	Closed	None	
9	98-08-015	Allison, Scott	Streambank Erosion	Streambank Protection	66	Ln Ft	Constructed/installed	Closed	None	
10	98-05-547	Anes, Rymy red	Filters/Nipapan Buffers	Fiter Strip	4.2	Acres	Constructed/installed	Closed	None	
11	98-00-604	Anderson, Carol	Cropland Ephem Erosion	Grassed Waterway	258	Ln Ft	Constructed/installed	Closed	None	
12	98-13-140	Anderson, Clark	Lakehore Restoration	Shoreline Protection	56	Ln Ft	Constructed/installed	Closed	None	
13	98-01-448	Anderson, James	Wildlife Habitat Improv	Upland Wildlife Habitat Mgmt	22.9	Acres	Constructed/installed	Closed	None	
14	98-12-212	Anderson, Scott	Native Grasses/Thaline	Restor & Mgmt of Decid	7.5	Acres	Constructed/installed	Closed	None	
15	98-13-038	Anderson, Neil	Groundwater Protection	Well Decons is oning	1	Each	Constructed/installed	Closed	None	
16	98-14-263	Asdel, Rich & Cathy	Lakehore Restoration	Shoreline Protection	1	Each	Site invest completed	Active	Recontact landowner	10/7/2014
17	98-07-005	Atchison, Dale	Streambank Erosion	Streambank Protection	55	Ln Ft	Constructed/installed	Closed	None	
18	98-13-963	Baggert, Rosemary	Raingarden	Raingarden	1	Each	Certificat on complete	Closed	None	10/30/2013
19	98-13-032	Bailey, Joyce and John	Bluff Erosion	Umed Waterway or Out	785	Ln Ft	Design finished	Active	Construct/install	10/15/2014
20	98-13-109	Baker, Mark & Ivonne	Raingarden	Raingarden	1	Each	Constructed/installed	Closed	None	
21	98-05-744	Balk, John	Feedlot	Feedlot				Closed	None	
22	98-06-063	Bennek, Paul	Wildlife Habitat Improv	Wildlife Habitat Mgmt	26.7	Acres	Constructed/installed	Closed	None	
23	98-01-463	Barns, Earl on	Wildlife Habitat Improv	Wildlife Habitat Mgmt	308.9	Ln Ft	Certification complete	Closed	None	
24	98-13-128	Barns, Don	Living Windbreak/Bambers	Windbreak/Shadebark Perovats	2069	Ln Ft	Certification complete	Closed	None	
25	98-19-172	Barns, Don	Filters/Nipapan Buffers	Fiter Strip	4.1	Acres	Voucher processed	Closed	None	
26	98-08-016	Barns, Don	Conservat on Drainage	Fiter Strip	4.1	Acres	Constructed/installed	Closed	None	



PARTING THOUGHTS

- ▶ Start with a business analysis
 - ▶ Current processes
 - ▶ What's working/what's not
- ▶ Identify specific goals/outcomes
 - ▶ Simplify processes?
 - ▶ Time savings?
 - ▶ Increase accountability?
- ▶ Research technology options
- ▶ Understand limitations
 - ▶ User habits/Technical aptitude
 - ▶ \$\$\$



THINGS TO CONSIDER

- ▶ Consider ongoing support and maintenance needs
 - ▶ Compatibility with existing information systems (e.g. county?)
 - ▶ Internal or external?
- ▶ Consider your team throughout the process
 - ▶ Involve them from the start - buy in is critical!
 - ▶ Mimic familiar terms and work flows
 - ▶ Allow them to test and provide feedback along the way
- ▶ Start simple
 - ▶ Grow into the system



THANK YOU

